

4. Approval

- 4a. [20-0358](#) Contract - Project Technical Support - Fare Coordination / Integration Study and Business Case - Steer (Not to Exceed \$888,231)

A request for recommendation that the MTC Administration Committee approve a contract award with Steer to provide professional planning and analytical support, and to conduct user experience research for the Fare Coordination/Integration Study and Business Case in an amount not to exceed \$888,231.

Action: Refer to MTC Commission for Approval.

Presenter: William Bacon, MTC Co-Project Manager
Michael Eiseman, BART Co-Project Manager

Attachments: [4a_Contract_Steer_FareCoordination_SummarySheet.pdf](#)

5. Public Comment / Other Business

6. Adjournment / Next Meeting

The next meeting of the Fare Integration Task Force will be Monday, April 13, 2020 at 1:00 p.m. at the Caltrain/SamTrans Auditorium, 1250 San Carlos Avenue, 2nd Floor, CA 94070

Public Comment: The public is encouraged to comment on agenda items at Committee meetings by completing a request-to-speak card (available from staff) and passing it to the Committee secretary. Public comment may be limited by any of the procedures set forth in Section 3.09 of MTC's Procedures Manual (Resolution No. 1058, Revised) if, in the chair's judgment, it is necessary to maintain the orderly flow of business.

Meeting Conduct: If this meeting is willfully interrupted or disrupted by one or more persons rendering orderly conduct of the meeting unfeasible, the Chair may order the removal of individuals who are willfully disrupting the meeting. Such individuals may be arrested. If order cannot be restored by such removal, the members of the Committee may direct that the meeting room be cleared (except for representatives of the press or other news media not participating in the disturbance), and the session may continue.

Record of Meeting: Committee meetings are recorded. Copies of recordings are available at a nominal charge, or recordings may be listened to at MTC offices by appointment. Audiocasts are maintained on MTC's Web site (mtc.ca.gov) for public review for at least one year.

Accessibility and Title VI: MTC provides services/accommodations upon request to persons with disabilities and individuals who are limited-English proficient who wish to address Commission matters. For accommodations or translations assistance, please call 415.778.6757 or 415.778.6769 for TDD/TTY. We require three working days' notice to accommodate your request.

可及性和法令第六章: MTC 根據要求向希望來委員會討論有關事宜的殘疾人士及英語有限者提供服務/方便。需要便利設施或翻譯協助者，請致電 415.778.6757 或 415.778.6769 TDD / TTY。我們要求您在三個工作日前告知，以滿足您的要求。

Acceso y el Titulo VI: La MTC puede proveer asistencia/facilitar la comunicación a las personas discapacitadas y los individuos con conocimiento limitado del inglés quienes quieran dirigirse a la Comisión. Para solicitar asistencia, por favor llame al número 415.778.6757 o al 415.778.6769 para TDD/TTY. Requerimos que solicite asistencia con tres días hábiles de anticipación para poderle proveer asistencia.

Attachments are sent to Committee members, key staff and others as appropriate. Copies will be available at the meeting.

All items on the agenda are subject to action and/or change by the Committee. Actions recommended by staff are subject to change by the Committee.

Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 20-0356 **Version:** 1 **Name:**
Type: Report **Status:** Informational
File created: 2/11/2020 **In control:** Fare Integration Task Force
On agenda: **Final action:**

Title: Overview of the Fare Coordination / Integration Study and Business Case
Overview of the Fare Coordination/Integration Study and Business Case.

Sponsors:

Indexes:

Code sections:

Attachments: [3ai Update Feb TaskForce.pdf](#)

Date	Ver.	Action By	Action	Result
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Subject:

Overview of the Fare Coordination / Integration Study and Business Case

Overview of the Fare Coordination/Integration Study and Business Case.

Presenter:

William Bacon, MTC Co-Project Manager
Michael Eiseman, BART Co-Project Manager

Recommended Action:

Informational

Attachments:

Fare Integration Task Force

February 24, 2020

Agenda Item 3a

Overview of the Fare Coordination / Integration Study and Business Case

Subject: Overview of the Fare Coordination/Integration Study and Business Case.

Background: At its September 2019 meeting the Clipper® Executive Board approved a scope of work for a Fare Coordination/Integration Study and Business Case and designated BART and MTC as Co-Project Managers for the effort.

Key objectives of the project, as defined by the Clipper Executive Board upon approval of the project scope include:

- Developing goals for the regional fare system that will support an improved user experience, increased transit ridership and build on robust public outreach;
- Identifying barriers, especially barriers related to fares and the user experience, that are impeding increased ridership;
- Identifying opportunities to increase transit ridership by improving the regional fare system through regional fare coordination and integration strategies; and
- Developing a detailed implementation plan, including funding plan, for recommended improvements.

The project includes a variety of different venues to provide direction and input to staff and the consultant team including:

Fare Integration Task Force: The Task Force has project oversight responsibilities for all aspects of the project and serves as the owner and sponsor of the work. It consists of the members of the Clipper Executive Board as well as the Chair and Vice Chair of the Bay Area County Transportation Agencies (BACTA) group, currently the executive directors of the Solano Transportation Authority (STA) and the Napa Valley Transportation Authority (NVTA). Both STA and NVTA also manage and/or operate bus services in their counties which utilize both the Express Lanes network and local streets. The MTC Commission also directed staff to include the Executive Director of the Livermore Amador Valley Transit Authority (LAVTA) as a member of the Task Force. The Task Force will meet on average every other month over the course of the project.

Staff Working Group: Staff from each of the agencies represented on the Task Force collaborate with the Co-Project Managers through the Staff Working Group. The Staff Working Group will provide guidance and support to the consultant team throughout the project and meet regularly (approximately every other week).

Policymaker Forum on Fare Coordination/Integration: A convening of transit agency board members and MTC Commissioners at key points over course of the project (total of 3-4 meetings, or approximately quarterly assuming 12-18 month timeline) to receive status updates, provide feedback, and discuss the project. Meeting locations will rotate around the Bay Area (East Bay, San Francisco, and the Peninsula). The Policymaker Forum's role will be advisory; the Fare Integration Task Force will remain the governing body for the project.

MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration:

This new subcommittee of MTC's Policy Advisory Council (a citizen's advisory body to MTC) will bring together Policy Advisory Council members and representatives from business, equity, education, and other stakeholder organizations. The subcommittee will meet approximately every other month, with its first meeting anticipated in April 2020 and serve as the primary public stakeholder body for the project.

Each of the above bodies, with the exception of the Staff Working Group, will be convened through duly noticed public meetings.

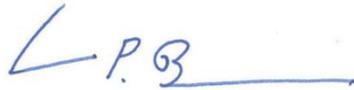
Issues: None identified.

Recommendation: Information.

Attachment: Presentation slides.



Michael Eiseman, Director of Financial Planning, BART



William Bacon, Policy and Financial Analyst, MTC

Item 3a

Overview of the Fare Coordination/Integration Study and Business Case

February 24, 2020

Fare Integration Task Force



Fare Coordination/Integration Study

Objectives

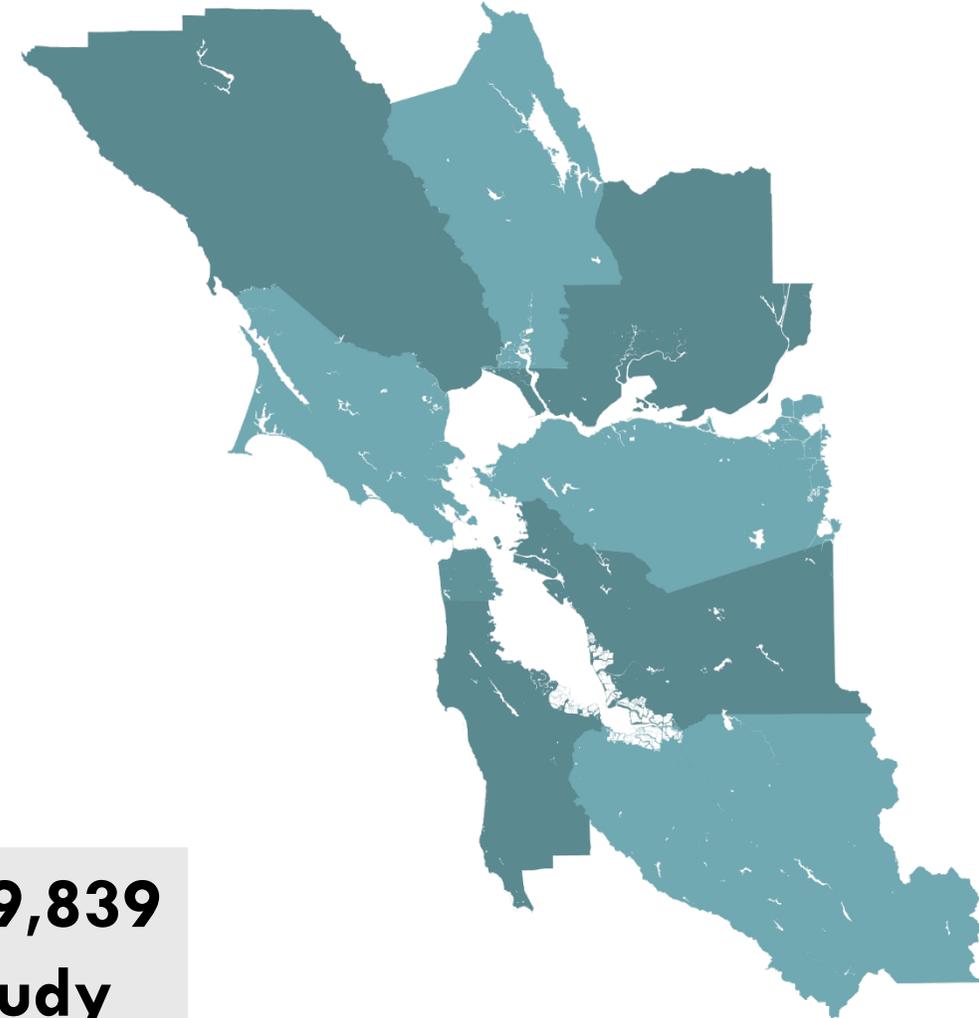
Develop goals for the regional fare system that will support an improved user experience, increased transit ridership and build on robust public outreach;

Identify barriers, especially barriers related to fares and the user experience, that are impeding increased ridership;

Identify opportunities to increase transit ridership by improving the regional fare system through regional fare coordination and integration strategies; and

Develop a detailed implementation plan, including funding plan, for recommended improvements.

Commission approved an allocation of \$599,839 in RM 2 funds in Oct. 2019 to support the study



Transit Operators and MTC Working Together

Fare Integration Task Force – Project Ownership

Co-Project Managers – BART & MTC staff

Transit Operator Staff Working Group

Consultant Team

Policymaker and Stakeholder Engagement

Policymaker Forum on Fare Coordination/Integration

MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration

Fare Integration Task Force



Project Scope

Transit operators and MTC staff jointly developed the project scope, comprised of seven (7) key tasks



Task 1: Problem Statement and Goals



Task 2: Existing Conditions and Background Research



Task 3: Barriers to Transit Ridership



Task 4: Alternative Solutions



Task 5: Alternatives Analysis



Task 6: Recommendations and Implementation Plan



Task 7: Stakeholder Engagement and User Research

Item 4a

Request to Recommend Award of a Contract for Project Technical Support to Steer



Request for Proposals

Conducted from November 20 to January 8

RFP sent to 2,730 individuals/firms

Proposers' conference attended by 15 firms

Three teams submitted proposals

Cambridge Systematics

LTK Engineering Services

Steer

Selection Process and Recommendation

12 person selection panel consisting of MTC and transit operator staff

After an in-depth process consisting of proposal reviews, interviews, and a subsequent discussion phase staff are recommending award of the contract to Steer

Evaluation Criteria			
Qualification and Experience – 40 points	34.42	34.25	27.00
Approach and Work Plan – 40 points	34.67	31.33	22.42
Cost Effectiveness – 15 points	12.42	10.67	10.08
Price – 5 points	4.92	4.93	5.00
Small Business Enterprise - 5 bonus points	0	0	0
Total	<u>86.42</u>	81.18	64.5

User Experience Research

Commitment at time of Oct. 2019 RM 2 allocation to “report to the Task Force and the Commission on the user research approach and additional resources that may be needed to expand the breadth of that work at the time of contract award action in early 2020”

Steer’s proposal partners with sub-consultant OXD to perform a baseline level of user research to inform the development and evaluation of alternatives

\$288,234 in additional funds would allow for more robust user research

Experience mapping, customer personas, co-creation of fare products with customers, testing and prototyping, and workshops

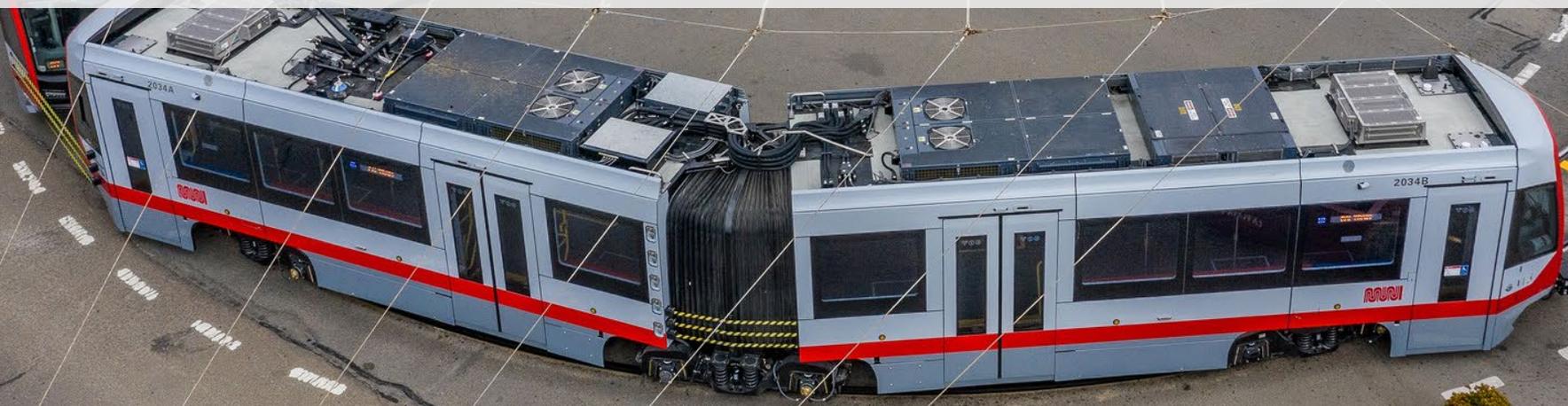
Deeper and broader user-centered research aims to better understand the “why” behind transit usage, barriers preventing ridership, and effective design of alternatives to optimize transit fares

Project Schedule

- **March 2020 - Project team kick off – Staff Working Group + Steer**
- **Spring/Summer 2020 – Initial meetings of MTC Policy Advisory Council Subcommittee on Fare Coordination/Integration and the Policymaker Forum**
- **Fall 2020 – Project team begins development of alternative fare policies for evaluation and user research testing**
- **Winter 2020/21 – Project team conducts detailed analysis of financial and ridership impacts and develops implementation strategies**
- **June 2021 – Project team presents final report and recommendations**

Requested Action

Recommend that the MTC Administration Committee authorize the MTC Executive Director or designee to negotiate and enter into a contract with Steer not to exceed \$888,231.



Metropolitan Transportation Commission

375 Beale Street, Suite 800
San Francisco, CA 94105

Legislation Details (With Text)

File #: 20-0358 **Version:** 1 **Name:**
Type: Contract **Status:** Committee Approval
File created: 2/11/2020 **In control:** Fare Integration Task Force
On agenda: 2/24/2020 **Final action:**
Title: Contract - Project Technical Support - Fare Coordination / Integration Study and Business Case - Steer (Not to Exceed \$888,231)

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Sponsors:

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A request for recommendation that the MTC Administration Committee approve a contract award with Steer to provide professional planning and analytical support, and to conduct user experience research for the Fare Coordination/Integration Study and Business Case in an amount not to exceed \$888,231.

Presenter:

William Bacon, MTC Co-Project Manager
Michael Eiseman, BART Co-Project Manager

Recommended Action:

Refer to MTC Commission for Approval.

Attachments:

Fare Integration Task Force

February 24, 2020

Agenda Item 4a

Contract – Project Technical Support – Fare Coordination / Integration Study and Business Case – Steer (Not to Exceed \$888,231)

Subject: A request for recommendation that the MTC Administration Committee approve a contract award with Steer to provide professional planning and analytical support, and to conduct user experience research for the Fare Coordination/Integration Study and Business Case in an amount not to exceed \$888,231.

Background: In October 2019 the Commission approved an allocation of \$599,839 in Regional Measure 2 (RM2) funds from the RM2 Integrated Fare Structure Program (RM2 project #34) to support the development of a Bay Area transit Fare Coordination/Integration Study and Business Case. The study seeks to propose changes to the Bay Area’s transit fare policies as a way to improve the passenger experience and grow transit ridership across the Bay Area. The study is being managed jointly by MTC and BART.

Procurement Process

Between November 20, 2019 and January 8, 2020 MTC conducted a Request for Proposals (RFP) for consultant technical support as well as to conduct user experience research as a part of the study. The RFP was posted on MTC’s website and an e-mail advertising the opportunity was sent to 2,730 individuals and firms. The RFP materials were download from MTC’s online procurement portal by 61 firms. On December 4, 2019 MTC hosted a Proposers’ Conference which was attended by 15 firms.

MTC received three qualified proposals, led by Cambridge Systematics, LTK Engineering Services, and Steer. Each of these firms’ proposals were supported by a team of sub-consultants which included for Cambridge Systematics: Jacobs, Urban Labs LLC, and Corey, Canapary & Galanis; for LTK Engineering Services: EMC Research, Inc, George Naylor, and TMD; and for Steer: Arup, BMI, Deutsche Bahn Engineering & Consulting USA, Martin Powell, OXD, and Rebel Group.

A panel of 12 members comprised of staff from MTC, BART, AC Transit, Caltrain, Golden Gate Transit/Ferry, SamTrans, San Francisco Municipal Transportation Agency, Santa Clara Valley Transportation Authority, Solano County Transit, and the Napa Valley Transportation Authority performed an initial evaluation and then held an interview to score the proposals based on the evaluation criteria below:

Evaluation Criteria	Steer	Cambridge Systematics	LTK Engineering Services
Qualification and Experience 40 points	34.42	34.25	27.00
Approach and Work Plan 40 points	34.67	31.33	22.42
Cost Effectiveness 15 points	12.42	10.67	10.08
Price 5 points	4.92	4.93	5.00
Small Business Enterprise 5 bonus points	0	0	0
Total	86.42	81.18	64.5

Based on its evaluation, the panel recommends the team led by Steer. A number of identified strengths led to the panel's recommendation, including:

- A highly qualified team with demonstrated experience and qualifications in the areas of expertise in fare policy as sought in the RFP;
- Extensive experience conducting user experience research and translating that research into meaningful insights to guide fare policy development and evaluation;
- A project director with proven fare policy experience and a project management plan to manage risk; and
- A team with a depth of knowledge and appropriate staff expertise about fare policy in both the Bay Area and internationally.

Neither Steer, Cambridge Systematics, nor LTK Engineering Services claimed any points as registered small business enterprises. As a result all firms were awarded zero points through MTC's Small Business Enterprise Pilot Program.

Issues:

User Experience Research

When the Commission approved the allocation of RM2 funds for the study in October 2019 it placed a condition on the allocation directing staff to report back to the Commission on the proposed "user research approach and additional resources that may be needed to expand the breadth of that work at the time of contract award action in early 2020."

Steer's proposed user research approach relies on OXD, a Vancouver, Canada based firm specializing in design-based policy research, as the lead sub-consultant for user experience research in the study. OXD has done similar work for TransLink, Vancouver's transit operator, for TransLink's Fare Review project over the last several years.

The user research tasks in the RFP include both a required task which focuses on understanding how users would react to proposed alternative fare policies/structures as well as how fare policy creates barriers to transit usage, plus an optional task to allow proposers to describe additional user research tasks which they believe would help the project achieve its overall objectives. This scoping approach intends to both supplement key study findings and ensure effective competitive bidding for this component of the project. Given the limited budget for the study, constrained by the RM2 allocation, staff felt it was important to allow firms the option of proposing more extensive user research, beyond the constraints of an approximately \$600,000 study budget. All proposers were evaluated by the selection panel based on their responses to both the required and optional user research tasks.

Steer and OXD's proposed user research within the study budget includes extensive transit user and non-user interviews at various locations around the region. Their approach would use the feedback from the interviews to help guide the development of alternative fare policies which will be examined through the study.

Should an additional \$288,234 be made available for the project OXD would dramatically expand the breadth of user research to include a variety of innovative methods including experience mapping, customer personas, co-creation of fare products with customers, testing and prototyping, workshops, etc.

Based on the Steer proposal and the creative and novel approach proposed by OXD, staff are recommending that the study proceed with the optional user research tasks and will be recommending the use of \$288,234 in RM2 marketing funds, subject to the MTC budget process, to support the additional user research tasks proposed by Steer, bringing the total study budget to an amount not to exceed \$888,231.

Recommendation: Staff recommends that the Fare Integration Task Force recommend that the MTC Administration Committee authorize the Executive Director or designee to negotiate and enter into a contract with Steer not to exceed \$888,231 for professional planning and analytical support, and to conduct user experience research for the Fare Coordination/Integration Study and Business Case, subject to the agency's operating budget approval process for future fiscal years beyond Fiscal Year 2019-20.

Attachment: None



Michael Eiseman, Director of Financial Planning, BART



William Bacon, Policy and Financial Analyst, MTC